

# Retirement Checklist Items

Name: \_\_\_\_\_

Date: \_\_\_\_\_

AKO Email: \_\_\_\_\_

SSN: \_\_\_\_\_

Home Phone: \_\_\_\_\_

Cell: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

- ☐ Schedule an appointment with Retirement Counselor at 919-664-7565.
- ☐ Review Retirement Point Statement (RPAS) for accuracy. Make sure all correspondence credits (ACCP History) are reflected properly on the RPAS because it affects the amount of retirement pay. If errors need to be corrected, contact the Retirement Points System Manager. (SSG Angela Sutton)
- ☐ Verify all Survivor Benefit Plan items are in order (with Retirement Counselor)
- ☐ NGB 22 needs to be completed after RPAM closes out, which will be shortly after the effective discharge date has passed.
- ☐ NGB 22 is required to apply for State Pension. To apply for State Pension, coordinate with the State Retirement Counselor.
- ☐ Provide Service Member with a copy of "JFHQ-NC Pamphlet 600-50 Federal and State Retirement Handbook", dtd 22 July 2008.
- ☐ Provide Service Member with a copy of "Army National Guard Information Guide On Non-Regular Retirement", dtd 15 April 2009
- ☐ Advise SM how to access iPERMS through the HRC home page, and provide them with the AKO user name and login link.
  
- ☐ Complete final evaluation OER/NCOER.
- ☐ Final ORB/ERB updates – assignment history, training history, deployment history, awards, education.
- ☐ Contact education office to initiate education benefits transfer (if applicable).
- ☐ Advise Service Member to pick up a copy of Personnel Records (201 File) and medical records (from J1 MED).
- ☐ Review DD 93 and SGLV.
- ☐ Review NCNGA Insurance Policy.
- ☐ Highly recommend Service Member to get involved with the North Carolina National Guard Association (NCNGA), recommend life time membership with NCNGA, sign up for NCNGA email updates, invite them to attend NCNGA Annual Conventions to stay connected with their fellow comrades.
- ☐ For AGR and Technicians, recommend Service Member to set up an appointment with HRO for retirement counseling specific to their duty status.
- ☐ Resolve any pay issues (if applicable).
- ☐ Recommend downloading a copy of entire iPERMS file and burning to disk. It is also recommended to print a hard copy of iPERMS file, as an extra precaution for safe keeping, as digital formats change and become obsolete over time and may eventually be inaccessible by modern software in the future.
- ☐ Process DD 214 if applicable.
- ☐ Supply Turn-in.
- ☐ Address any additional questions or concerns the Soldier may have.
- ☐ Retirement award requests must be submitted to G1 with the discharge request.
- ☐ Request for Discharge OTAGNC Form 600-201 initiates retirement process for Enlisted Soldiers and a Retirement Request memo initiates retirement process for Officers.